



Wednesday, September 08, 2004

Performance Consultant Workshop

May 9, 2002

9 AM – 12:30 PM

Purpose: To prepare FSAU representatives to be performance consultants.

Desired Outcomes: *By the end of this workshop, we will be able to:*

- ☐ Explain the performance consultant role.
- ☐ Identify the steps and processes involved in being a performance consultant.
- ☐ Begin deploying the performance consultant process.

Agenda:

What	How	Who	Time
Start Up: – Welcome/ Purpose – Outcomes/ Agenda	<ul style="list-style-type: none"> • Introduction, welcome, and purpose • Review the agenda and the desired outcomes 	<ul style="list-style-type: none"> • Anne • Stephen 	<ul style="list-style-type: none"> • 5 min.
Overview of Goals	<ul style="list-style-type: none"> • Present overall concept (all phases) • Discuss overview of performance consultant role • Explain goals of the position • How will we measure our own success? • Explain the process: <ul style="list-style-type: none"> ◦ Discussion, needs assessment, proposal, review board, deliver services, reflect/review • Advice from the front line (Chuck) 	<ul style="list-style-type: none"> • Stephen 	<ul style="list-style-type: none"> • 15 min.
The Customer (<i>Customer comes first</i>)	<p>Customer relationships</p> <ul style="list-style-type: none"> • Link to advice from the front line • How to develop them? • Not sales – being in conversation • Key elements to the “consulting” model <ul style="list-style-type: none"> ◦ Tips for building and maintaining customer relationships ◦ Suggestions for communications and contacts <p>Customer’s business</p> <ul style="list-style-type: none"> • Research customer’s goals in Performance Plan, MIT report, strategic plan, etc. • Identify 1 or 2 discussion topics (or potential areas of need) to discuss with customer 	<ul style="list-style-type: none"> • Stephen 	<ul style="list-style-type: none"> • 45 min.
BREAK			
FSAU Products & Services	<ul style="list-style-type: none"> • Review communications team list of products and services 	<ul style="list-style-type: none"> • Anita 	<ul style="list-style-type: none"> • 15 min.
Needs Assessment	<ul style="list-style-type: none"> • Overview of the process • <i>Role play</i> • Review needs assessment approach and techniques document (including interview protocol) • Provide tool(s) for interviews 	<ul style="list-style-type: none"> • Katie 	<ul style="list-style-type: none"> • 45 min.
BREAK			



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Proposal process	<ul style="list-style-type: none">• How to create a proposal• Description of the review board concept	<ul style="list-style-type: none">• Stephen	<ul style="list-style-type: none">• 20 min.
Preview of Phase 2	<ul style="list-style-type: none">• High-level overview of the next phase• Facilitation and metrics	<ul style="list-style-type: none">• Stephen	<ul style="list-style-type: none">• 15 min.
Marketing strategy	<ul style="list-style-type: none">• Review and identify opportunities• Conduct basic information walk-through with primary customers• Maintain record of conversations• Conduct needs assessment	<ul style="list-style-type: none">• Katie	<ul style="list-style-type: none">• 15 min.
Meeting Evaluation	<ul style="list-style-type: none">• Review Desired Outcomes• Determine next meeting date/ time• +’s and –’s of this meeting’s structure	<ul style="list-style-type: none">• Stephen	<ul style="list-style-type: none">• 5 min.